

Improve Your Sales Productivity

57% of salespeople fail to qualify their prospects due to the lack of preparation. Many banking experts agree that poor call planning can have significant consequences in small business and commercial banking.

- **Salespeople say call preparation takes too much time.** AI Navigator reduces the time to prepare for a discovery call from hours to seconds.
- **Salespeople don't trust their CRM data or most data from third party sources.** AI Navigator's AI-powered algorithms automatically sort, verify and validate data from multiple data sources in seconds to provide accurate, timely insights for discovery call plans.
- **Salespeople don't know how to prepare for a discovery call or they have forgotten their training.** AI Navigator's AI-powered solution provides micro learning and micro task management in the salesperson 'moments-of-need'. AI Navigator leverages AI's strengths in adaptive learning, and AI-powered insights to improve discovery call preparation, coaching, and sales performance improvement..



AI Navigator SM



AI-Powered Sales Productivity



AI designed to work for you

AI Navigator is a next-generation AI-powered sales enablement platform that **integrates seamlessly with your CRM** to help commercial and small business bankers improve prospecting, coaching, discovery call planning, portfolio management, conversion rates, and time to convert. AI Navigator provides real-time insights, **automated CRM updates**, and sales coaching using AI-powered data collection algorithms, propensity models, and specialized banking industry data.

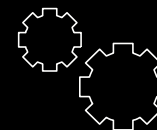
AI Navigator is a game changer for commercial banking sales teams

Your Personal Sales Assistant

AI Navigator is your personal sales assistant that listens, learns, adapts, and becomes better the more it is used. Less than 2% of sales are complete in a single meeting. Industry research indicates that many small business and commercial salespeople require five to six calls to complete a sales. **AI Navigator cuts that time in half while improving your sales velocity** (conversion rates, time-to-convert) **by at least 35% in the first six months.**

25 Years of Knowledge & Experience

Performance Insights and **St. Meyer & Hubbard** have used their collective knowledge and experience gained over 25 years to develop AI Navigator to transcend traditional sales best practices.



Contact Us

480-212-6082

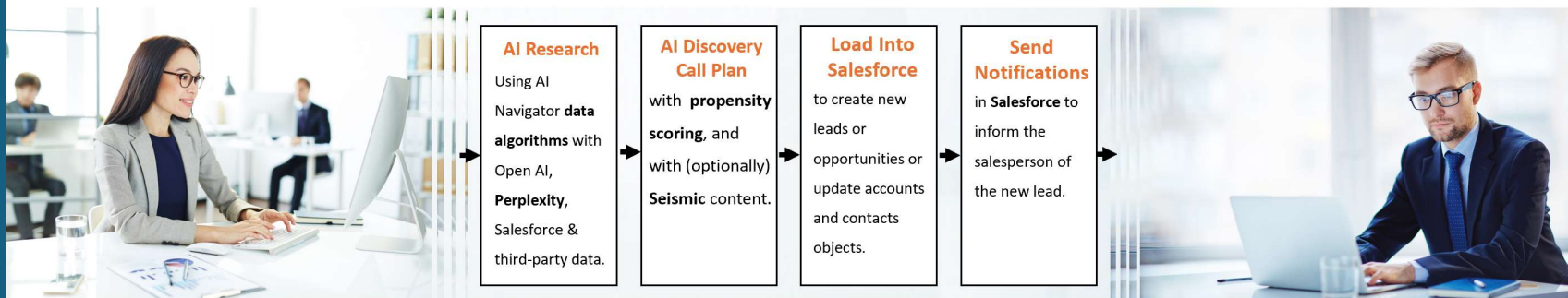
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AI Navigator Is Changing The Game For Sales & Marketing

Marketing teams may upload batches of hundreds or thousands of lead names to AI Navigator. The first step of the batch process is to use AI Navigators innovative data algorithms to ensure 98% accurate AI research – no more incorrect information. The second step is to build discovery call plans for each lead. The third step is to automatically load the discovery call plans in Salesforce (leads, accounts, contacts or opportunities) and send a notification to the salesperson. **No more inaccurate lead lists – fully researched discovery call plans loaded into the right Salesforce object ready for review, role-play, planning and action!**



Marketing Uses AI Navigator In Batch Mode

Marketing Provides a List of Prospects or a List of Existing Customer Opportunities (from AI Navigators Analytics). The lists are uploaded to AI Navigator with an Excel spreadsheet or API connector for batch processing.

Salesperson Uses AI Navigator in Salesforce

to access the new lead, review the discovery call plan, role-play various scenarios and ask questions to prepare for a discovery call on a new prospect or an existing customer.



From Discovery Calls to Close - Faster

Your feedback updates Salesforce records, improves discovery call plans, and accelerates sales cycles.

Use Your Salesforce Mobile App To Talk To AI Navigator When You Finish Your Meeting

Your phone call will be converted to text and stored in Salesforce in the right customer and opportunity records. **AI Navigator** will summarize your feedback, modify the discovery call plan and use it to develop best practices.

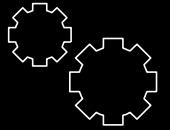
The Call Went Well

Largely because of AI Navigator's in-the-moment-of-need coaching. Now, to complete the sales process, Ann wants to share critical follow-up information before she forgets it.



Real-Time Feedback, Real Results

Update customer records and the discovery call plan instantly after a call and optimize your next move.



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AI Navigator is an AI-powered sales enablement application that **transcends discovery call preparation and traditional classroom training delivery**. AI Navigator can significantly enhance sales professionals' preparation for discovery calls.

Provide Personalized Learning Paths: AI Navigator uses AI algorithms to assess individual strengths and areas for improvement.

- **Provide AI-Powered Sales Scenarios & Role-Play Simulations:** Interactive scenarios (AI-Powered Simulations) that allow salespeople to practice their discovery call plan while learning about establishing credibility, setting the meeting agenda, asking context setting questions, using the GOAL questioning approach, telling stories, and developing joint commitment.
- **Real-Time Feedback & Coaching:** AI Navigator provides tools that analyze sales interactions to provide immediate feedback, highlighting strengths and pinpointing areas needing improvement.

An Iterative AI process of improvement

